Process Guide for

Student Web Application Products

FAFSA on the Web Site
PIN Web Site

2006-2007

U.S. Department of Education

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Overview

Preface

The *Student Web Application Products Process Guide* is designed to provide financial aid administrators (FAAs) with detailed information about changes we are making to Federal Student Aid's 2006-2007 Web application products for students: FAFSA on the Web and the PIN Web site.

Using the Free Application for Federal Student Aid (FAFSA) on the Web site at fafsa.ed.gov, students can apply for aid using FAFSA on the Web or Spanish FAFSA on the Web, or reapply for aid using Renewal FAFSA on the Web or Spanish Renewal FAFSA on the Web. In addition, students can also check the status of their financial aid applications and use their Personal Identification Numbers (PINs) to view their Student Aid Report (SAR) information, correct their application data, and electronically sign their applications. Parents can use their PINs to sign their children's financial aid applications electronically as well.

From the PIN Web site at pin.ed.gov, a user can:

- apply for a PIN,

- request that a PIN be re-sent,

- change his or her PIN,

- select his or her own personalized PIN,

- disable his or her PIN,

- update his or her mailing and e-mail addresses in the PIN database,

- select his or her challenge question and provide a challenge response.

What's New for 2006-2007?

Suggestions from the Financial Aid Community

Federal Student Aid is continually looking for new and innovative ways to make applying for financial aid over the Web easier and more convenient for students and their families. We are making numerous enhancements to our student Web application products for 2006-2007, as detailed in this process guide. You, your colleagues, and student aid applicants suggested many of these changes.

If you have ideas for additional enhancements, let us know by contacting the Federal Student Aid Information Center at 800/4-FED-AID (800/433-3243), TDD/TTY 800/730-8913, or by sending an e-mail to fafsaweb@pearson.com.

Demonstration Site

The FAFSA on the Web demonstration site can be used as a training tool for students, parents, and your financial aid staff. The demonstration Web site is available for use at fafsademo.test.ed.gov and will be updated for 2006-2007 by the end of November 2005.

User Name: eddemo

Password: fafsatest

Note: The user name and password fields are case-sensitive.

The demonstration Web site offers most of the features of the production Web sites for FAFSA on the Web and FAA Access to CPS Online.

Notes:

- Actual personal identifying information should never be used on this demonstration site as other users can view the data.

- No data is processed by the Central Processing System (CPS). An estimated Expected Family Contribution (EFC) is not calculated after an application is submitted on the demonstration site; however, it is calculated on the production site. The EFC value is always 99999 for any test case on the demonstration site.

- The site provides preloaded test data and FAA login information.

- Saved data and submitted data are cleared from the database every evening.

- Printed signature pages include a "test sample" watermark and should not be mailed to the processor. The CPS will not accept or process sample signature pages.

PIN Web Site Changes and Enhancements

For the 2006-2007 processing cycle, we made several enhancements to the PIN Web site as described below.

PIN Home Page

We made the following enhancements to the PIN home page:

- **Revised Home Page** – We revised the PIN home page to make it easier to use. All links now have descriptive flyover text on the home page to assist users in easily determining what functions can be performed when clicking on the menu link.

- **Reordered Menu Items** – We reordered the main menu items so the more frequently used options are listed first, with other options following in a logical order.

- **Added a Last Update Date** – At the bottom of the page, a date stamp has been added to display the last date the site was updated.

Other Enhancements

We made the following additional enhancements to the PIN Web site:

- **Request Duplicate PIN after Updating Personal Information** – We added the ability to request a duplicate PIN from the PIN information update confirmation page. This makes it easier for a user who changes his or her address or information on the PIN Web site to request a duplicate PIN after performing the update. After the user confirms the address, a duplicate PIN can be requested.

- **Improved Turnaround Time for Receiving Duplicate PINs Electronically** – Within four hours of a duplicate PIN request, the user will receive a PIN e-mail containing instructions for retrieving the PIN. The turnaround time in 2005-2006 for duplicate PIN requests was 12 hours. Please note: The turnaround time for the paper PIN mailer is not changing. It will still take 7-10 days to receive the PIN mailer, if the user did not provide an e-mail address.

- **Improved Turnaround Time for Receiving New PIN E-mails** – After new PIN request application data is matched successfully and returned by the SSA, PIN notification e-mails will be sent as soon as possible to recipients, rather than during a single nightly processing run.

- **PINs Disabled After 18 Months of Inactivity** – PINs will now be permanently disabled after 18 months of inactivity. We will begin calculating this 18-month period from January 2005 forward; thus the first deactivations of PINs due to inactivity will occur in July 2006. When a user attempts to use an expired PIN, the following text displays: "Our records show that your PIN has been inactive for 18 consecutive months. Your PIN was deactivated to protect you from unauthorized use of your PIN. To reestablish your PIN, you will need to reapply for a PIN. To reapply for a PIN, go to the PIN homepage and select Apply for a PIN. To exit, select PIN HOME." We are making this change to further strengthen the security of the PIN.

- **Changed the Agreement Activation Text** – The PIN activation process requires that the user "Agree" not to share his or her PIN. To make it clear to the user, the agreement label is updated to read, "I agree not to share my PIN." It is very important that PIN users do not share their PIN with anyone because the PIN can be used to access personal information and to provide an electronic signature.

FAFSA on the Web Changes and Enhancements

For the 2006-2007 processing cycle, we made several enhancements to the FAFSA on the Web site as described below.

FAFSA on the Web Home Page

We redesigned and enhanced the FAFSA on the Web home page to make it easier for students to locate the functions they want to use. The changes described below are intended to improve navigation on the page and include adding links and revising the titles of links to describe their purpose more thoroughly.

- **Added a Last Update Date** – At the bottom of the home page, a date stamp has been added to display the last time the site was updated.

- **Added Links to the Before Beginning a FAFSA Section:**

  - **Added a Link to the FAFSA on the Web Worksheet on the Home Page** – The "Pre-Application Worksheet" has been renamed the "FAFSA on the Web Worksheet" and is now easily accessible from the home page.

  - **Added a "Find my school codes" Link on the Home Page** – The school code search feature is now easily accessible from the home page.

  - **Added a "Students and Parents apply for a PIN" Link on the Home Page** – This link helps guide students and parents through the process of applying for a PIN before starting the FAFSA.

  - **Added a "Check Deadline Dates" Link on the Home Page** – This link enables applicants to more quickly and easily view key federal and state FAFSA deadline dates.

  - **Renamed the "Provide Electronic Signature" Link to "Sign Electronically Using Your PIN"** – This label is more descriptive and provides better guidance on where to sign electronically using the PIN.

Before Beginning a FAFSA

We made the following enhancements to the Before Beginning a FAFSA section:

- **Replaced the "Documents Needed" Page with a Printable "Checklist" –** We replaced the "Documents Needed" page with a "checklist" applicants can print and use to gather pertinent documents to fill out the FAFSA.

- **Updated the FAFSA on the Web Worksheet –** Many applicants use a paper FAFSA in preparation for completing the FAFSA on the Web application. Because of "skip logic" and other features of the Web application, the order of the questions on FAFSA on the Web is not in the same order as the questions on the paper FAFSA. This makes it difficult for applicants to complete the online application using a paper FAFSA. The FAFSA on the Web Worksheet (formerly the Pre-Application Worksheet) is designed to provide Web filers with a preparation tool better suited to their needs than the paper FAFSA.

  We have enhanced the 2006-2007 FAFSA on the Web Worksheet to improve its appearance and ease of use. These enhancements include a redesign of the Worksheet's format, improved instructions, the addition of the U.S. Department of Education seal, the addition of state aid deadline dates, and improved differentiation between the student and parent questions.

  The English and Spanish versions of the 2006-2007 FAFSA on the Web Worksheet are available on the IFAP Web site at ifap.ed.gov and on Student Aid on the Web at studentaid.ed.gov. Beginning in late November, students can print the Worksheet from Section 1 of the FAFSA on the Web home page at fafsa.ed.gov. The new Worksheet will be available in color as well as in black-and-white for students without color printers. .

  The 2006-2007 FAFSA on the Web Worksheet has been printed and distributed so that postsecondary schools, high schools, libraries, and community agencies can have bulk quantities of the Worksheet available for students and families. For more information regarding distribution of the FAFSA on the Web Worksheet, please review Dear Colleague Letter (DCL) GEN-05-10, available on IFAP (ifap.ed.gov). A sample Worksheet is provided as an attachment to the letter.

  We encourage you to distribute copies of the Worksheet to your students or direct your students to FAFSA on the Web or Student Aid on the Web, where they can print a copy for themselves.

Filling Out a FAFSA

We made the following enhancements to the Filling out a FAFSA section:

- **Link to Duplicate PIN Request Added to Authentication Page** – To assist PIN users who have misplaced or forgotten their PIN, the PIN Authentication page included as part of the standard Web login process will be updated to display an "I forgot/don't know my PIN" option. This option will link to the Duplicate PIN Request page where the user can request a duplicate PIN.

- **Removed the Save Prompt between Steps –** FAFSA on the Web will no longer prompt the user to save his or her application after each step. The system will automatically save the data without any user interaction. Also, we will continue to employ an auto save feature that is automatically invoked when a session is terminated before the application is submitted.

- **Removed the "Apply for a PIN" Option for Users Who Electronically Signed –** Applicants who provide an electronic signature using their PIN at the beginning of the session will no longer be asked if they would like to apply for a PIN within the application.

- **Added "Previous" Button on Login Page –** We added a "Previous" button to the login page so that users who incorrectly indicate they will sign the application with a PIN can return to the previous page and update their response.

- **Updated Auto Zero EFC Text –** We added text to the application to inform students eligible for an Automatic Zero EFC that they can complete the income data on the application without affecting their eligibility.

- **Removed "Answer is Correct" and "Change My Answer" buttons from Run Final Check Process –** Previously, when data was edited and a verifiable reject was found during the Run Final Check process, a student could verify his or her answers by selecting "Answer is Correct" or change his or her answers by selecting "Change My Answer." For 2006-2007, these buttons have been removed from this process and applicants must re-enter data to verify a response. Also, the answer that was previously entered will not be displayed to the applicant at the time that they are asked to re-enter a response. In the past we found that users were selecting "Answer is Correct" without actually reviewing the information, resulting in the need for corrections.

- **Added New Required Web Fields** – The additional fields now required to be completed in Web applications, including Renewal FAFSA on the Web, are listed below:

  - Spouse's Income (if Student's Marital Status is married)

  - Mother's and Father's Income (if Parents' Marital Status is married and the student is dependent)

  - Mailing State

- **Option to Copy Parental Data to a New FAFSA Only Available for Applications that Contain Parental Data** – Previously, the "Begin a new application with the parental data already filled in" option on the confirmation page was presented to all applicants, even if their application did not contain parental information. For 2006-2007, the option will be presented only to dependent students and to independent students who provide parental data.

- **Enrollment Plan Question Made More Prominent** – In response to user feedback, we are more prominently displaying the Enrollment Plan question for corrections. We expect the increased visibility of the question to improve the likelihood that the student will provide a response.

- **Modified Renewal Applications Functionality** – We added the following functionality for renewal applications:

  - **Added an Edit for Name and Date of Birth** – A new edit checks that the "Name" and "Date of Birth" entered on the login screen match what is on the renewal application. If the name and date of birth do not match, the user will receive an edit on the first page of the application asking for verification of his or her name and date of birth.

  - **Reminder to Verify or Update Mailing Address and E-mail Address** – Renewal FAFSA on the Web now has pop-up reminders asking students to verify or update their mailing address in addition to their e-mail address.

  - **"Were you born before January 1, 1983?" Pre-filled** – The value for the "Were you born before January 1, 1983?" question is based on the date of birth provided during the login process and is now pre-filled on the application. The user will see 'Yes' if the date of birth is before 01/01/1983 and 'No' if the date of birth is on or after 01/01/1983.

  - **Will Not Pre-fill Number of Family Members or Number in College Fields** – Students must now enter values for the following fields, as responses from the prior year will no longer carry forward:

    - Student's Number in College or Parents' Number in College

    - Student's Number in Household or Parents' Number in Household

- **Required Asset questions** – Because responses from the prior year no longer carry forward, students and parents of dependent students must enter responses to the following asset questions, unless they qualify for the Simplified Needs Test (SNT) or the Automatic Zero EFC and are not required to fill out the information for consideration of other types of aid, such as state aid:

  - Total current balance of cash, savings, and checking accounts

  - Net worth of your investments, including real estate

  - Net worth of your current business and investment farms

- **Will Not Pre-fill School Codes and Associated Housing Codes –** Based on requests from the financial aid community, we will no longer carry forward and pre-populate any of the six Federal School Codes or the associated housing codes from the student's 2005-2006 application. In the past, it would have been possible for the student to neglect to enter a school code on the paper Renewal FAFSA, so school codes from the previous year were carried forward to ensure the student's record was sent to at least one school. Renewal FAFSA on the Web will require the student to enter at least one Federal School Code, so this is no longer an issue. This change will help decrease the number of Institutional Student Information Records (ISIRs) schools receive for students who are not attending their school.

- **Students with Dependency Override Can Skip Parent Questions in Corrections on the Web –** Students who have a dependency override can now make corrections through FAFSA on the Web without being prompted to provide parental data. Previously students had to provide parental data because Corrections on the Web did not recognize the dependency override.

- **2006-2007 Double Reporting Warning Edits** – The CPS performs double reporting warning edit checks by comparing certain data fields on the applicant's 2006-2007 record and triggering edits if duplicative values are provided under certain conditions. These edits, and the corresponding SAR comments, are designed to prevent the student from double reporting income or assets, which would impact the calculation of the student's EFC.

  When applying on the Web, students who meet the criteria for double reporting warning edits are prompted to either correct the conflicting data or verify that the data is correct by re-entering the reported value. If the student overrides the double reporting edit by verifying that the data is correct, the corresponding SAR comment is suppressed.

  Using FAA Access to CPS Online, FAAs can also override double reporting warning edits and suppress the corresponding SAR comments. To override the edit(s) in FAA Access to CPS Online, the FAA must re-enter the reported value and submit it to the CPS. This serves as the FAA's verification that the data is correct.

FAFSA Follow-up

We made the following enhancements to the FAFSA Follow-up section:

- **Decreased Number of Days Applications Held in Signature Hold File –** Web applications that are missing signatures are currently stored in the Signature Hold file for 14 days. If a signature page or electronic signature is not received within 14 days, the application is processed and the applicant is sent a rejected SAR to sign. In 2006-2007, the waiting period for student records stored in the Signature Hold file will be reduced to seven days. We are making this change to speed up the processing of applications after determining that a majority of student applications with missing signatures are resolved and removed from Signature Hold in seven days or less. If a signature page or an electronic signature is received after the application is processed, the signature will be applied to the record and a new transaction will be created that reflects the receipt of the appropriate signatures.

- **Added Detail to the "Application on File" page –** We enhanced the "Application on File" page that displays when a student tries to complete a subsequent application. Links are now provided to additional options and features, based on the status of the previously submitted application:

    – Link to check the status of the application (application not yet processed)

    – Link to make corrections (application processed)

    – Link to print an additional copy of the student's signature page (application on hold pending receipt of missing signature[s])

Getting Help

How Do I Get Help?

If you have any questions regarding this guide or the 2006-2007 FAFSA on the Web and PIN Web site in general, contact the Federal Student Aid Information Center for assistance by calling 800/4-FED-AID (800/433-3243), TDD/TTY 800/730-8913, or by sending an e-mail to fafsaweb@pearson.com.